



5 New features of China's Travel Retail Industry in 2022

2022中国旅游零售行业的5个新特征

Mr. Jason Cao

Founder, DutyFreeExpert (DFE)

General Manager of Amberich International (HK)



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About the speaker

Mr. Jason Cao, DFE Founder

MBA, Founder of "DutyFreeExpert" (DFE)

Managing Director, Amberich International (HK) Ltd

Mentor of School of Management, Fudan University

Visiting Professor, Sanya Aviation Tourism Vocational College

Executive Director of the Securities Investment Club, School of Management, Fudan University

Jason has 26 years of experience in the duty-free industry, worked for British American Tobacco, Imperial Tobacco, Sunrise Duty Free Group and have been working for Amberich International (HK) Ltd as Managing Director for 9 years. During the 12 years of working in Sunrise Duty Free Group, Jason was mainly responsible for the merchandising and procurement of perfume and cosmetics for Sunrise Duty Free Shanghai Airport and Beijing Airport. His work scope covers merchandising and procurement of tobacco, alcohol, perfume and cosmetics; brand marketing; procurement system research and development; retail space design; industry conferences; staff recruitment and training etc.

Jason founded Amberich International (HK) Ltd. in 2013 to engage in management consulting, project operation, integrated marketing, retail space design, brand agency/distribution, recruitment and training etc. in the travel retail (duty-free) industry. Jason found the WeChat public account DutyFreeExpert (DFE) and has been operating it for 8 years. It is the most influential media in China's duty-free and travel retail industry with 25,000+ precision industry followers. DFE has long term partnership with TFWA, WDFC, MoodieDavittReport etc industry associations and medias.

As the chief editor of DFE and a researcher of duty free industry, Jason is a high frequent speaker and consultant in travel retail industry, investment sector and education industry in China.

Contact DFE Assistant via WeChat: DFE007; Contact Jason via email: Jason@idutyfree.cn

- 26 years working experience in duty free industry
- 12 years as merchandising head in Sunrise Duty Free, managing 65 suppliers total 120 brands
- As the Founder and Chief Editor of DFE for 9 years with 26500+ industry followers.



1. China Travel Retail keep growing in 2022 in dynamic way.



1. Recent update of China Travel Retail

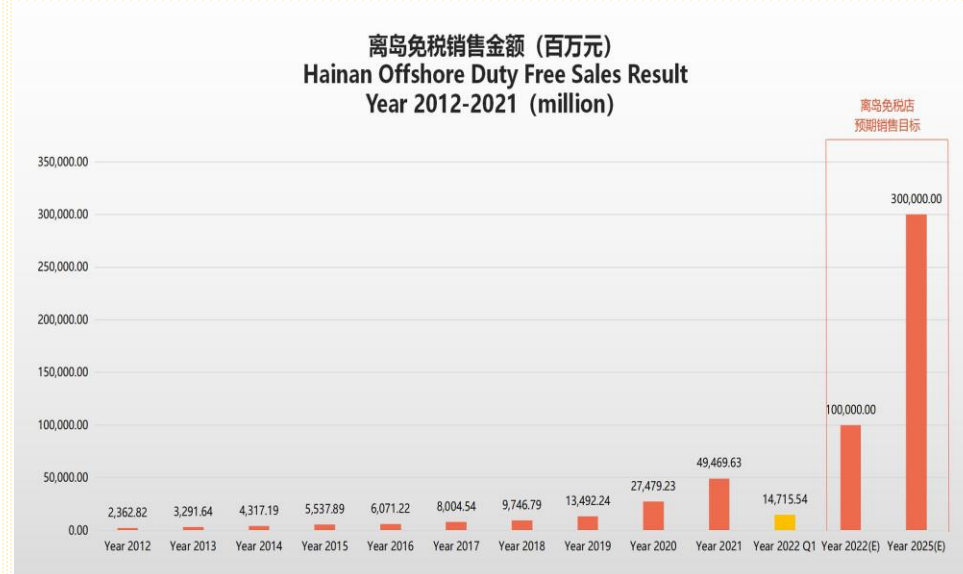
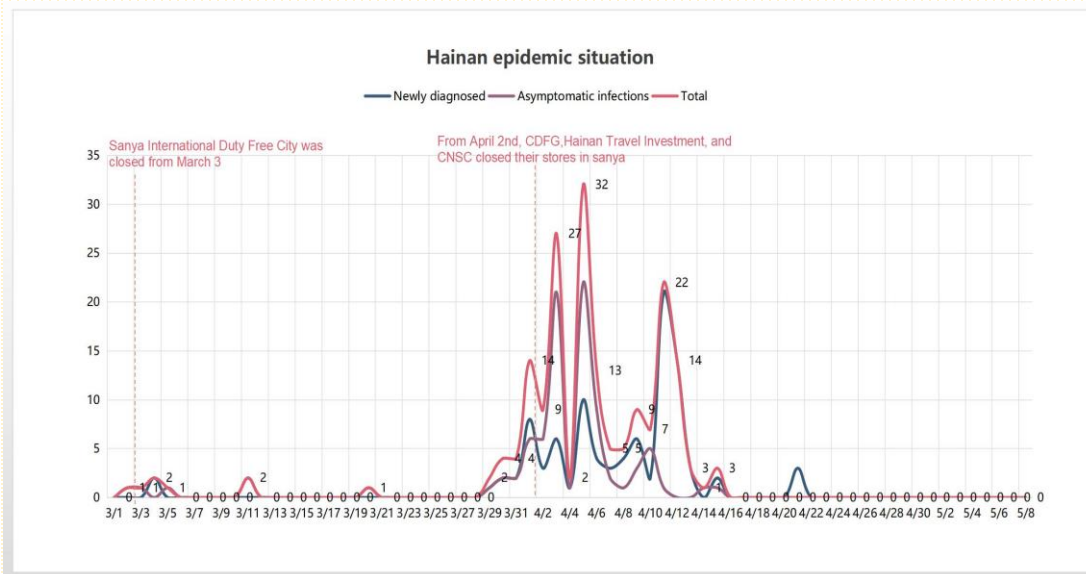
No.	Duty Free Shop	Retailer	Progress
1	Haikou Meilan Airport Duty-free Store of T1	CDFG	It was put into operation on December 21, 2011, with a total business area of 8,613 square meters
2	Haikou Meilan Airport Duty-free Store of T2	CDFG	The operating area is 9,313 square meters, and it will open on December 2, 2021, with an opening area of 4,890 square meters.
3	cdf Sanya International Duty Free City	CDFG	The store, located in Haitang Bay, Sanya, officially opened for business on September 1, 2014, with a total construction area of about 120,000 square meters and a commercial area of 72,000 square meters. It is the largest single duty-free store in the world.
4	cdf Haikou Mova Plaza Store	CDFG	It was opened on January 19, 2019, with an opening area of 13,000 square meters in the first phase, and an opening area of 9,000 square meters in the second phase on June 1, 2019, with a total operating area of 22,000 square meters.
5	cdf Qionghai Boao Airpor Duty Free Shop	CDFG	It was opened in January 2019 and is located in the Boao Forum for Asia scenic spot in Qionghai, with an operating area of 4,200 square meters.
6	Lagardère HTDF	Hainan Travel Investment	It was opened on December 30, 2020, with a business area of 95,000 square meters, including a total of about 50,000 square meters of retail space.
7	Sanya International Duty Free Shopping Park	CNSC	With a total area of nearly 40,000 square meters, it was opened on December 30, 2020. Covering perfume cosmetics, jewelry, luggage and leather goods, clothing and accessories, watches and clocks, wine, 3C digital, sports outdoor, big health and other categories.
8	cdf Sanya Phoenix International Airport Store	CDFG	It was opened on December 30, 2020, with a total area of about 6,800 square meters and an area of about 800 square meters for the first phase. An e-commerce experience area and product display area were opened.
9	Shenzhen Duty Free DFS Haikou Mission Hills Duty Free City	TIMES'DF	It is located in Mission Hills Resort, Haikou, with a planned total business area of 100,000 square meters. It will officially open on January 31, 2021. At present, the first phase has a business area of 20,000 square meters, and more than 400 international brands have settled in.
10	GDF Dufry Haikou	HDH	It is located in the east area of Haikou Mova Plaza, with a total construction area of 38,920 square meters. The first phase is 3,260 square meters. It will open at the end of January 2021; the second phase is 30,000 square meters, which will open on August 30, 2021. The third phase is 6,250 square meters and is currently under construction.

Updated on March, 15, 2022





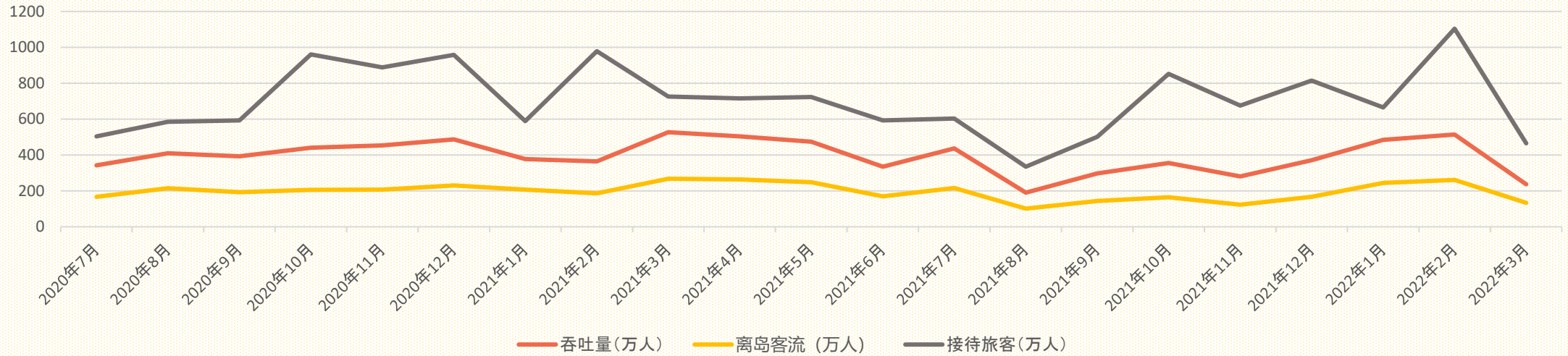
1. Recent update of China Travel Retail





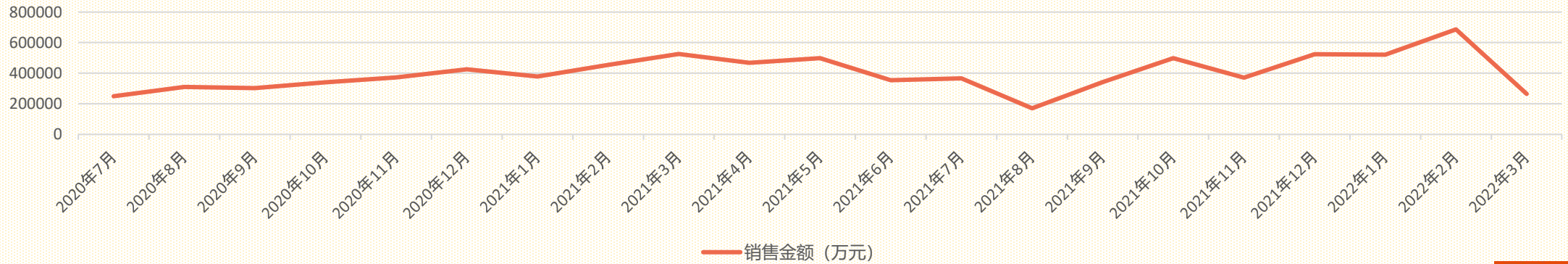
1. Recent update of China Travel Retail

海南客流量走势图
Hainan Traffic Trend



海南离岛免税销售金额

Hainan Offshore Duty Free Sales since new Policy Release July 1st, 2020

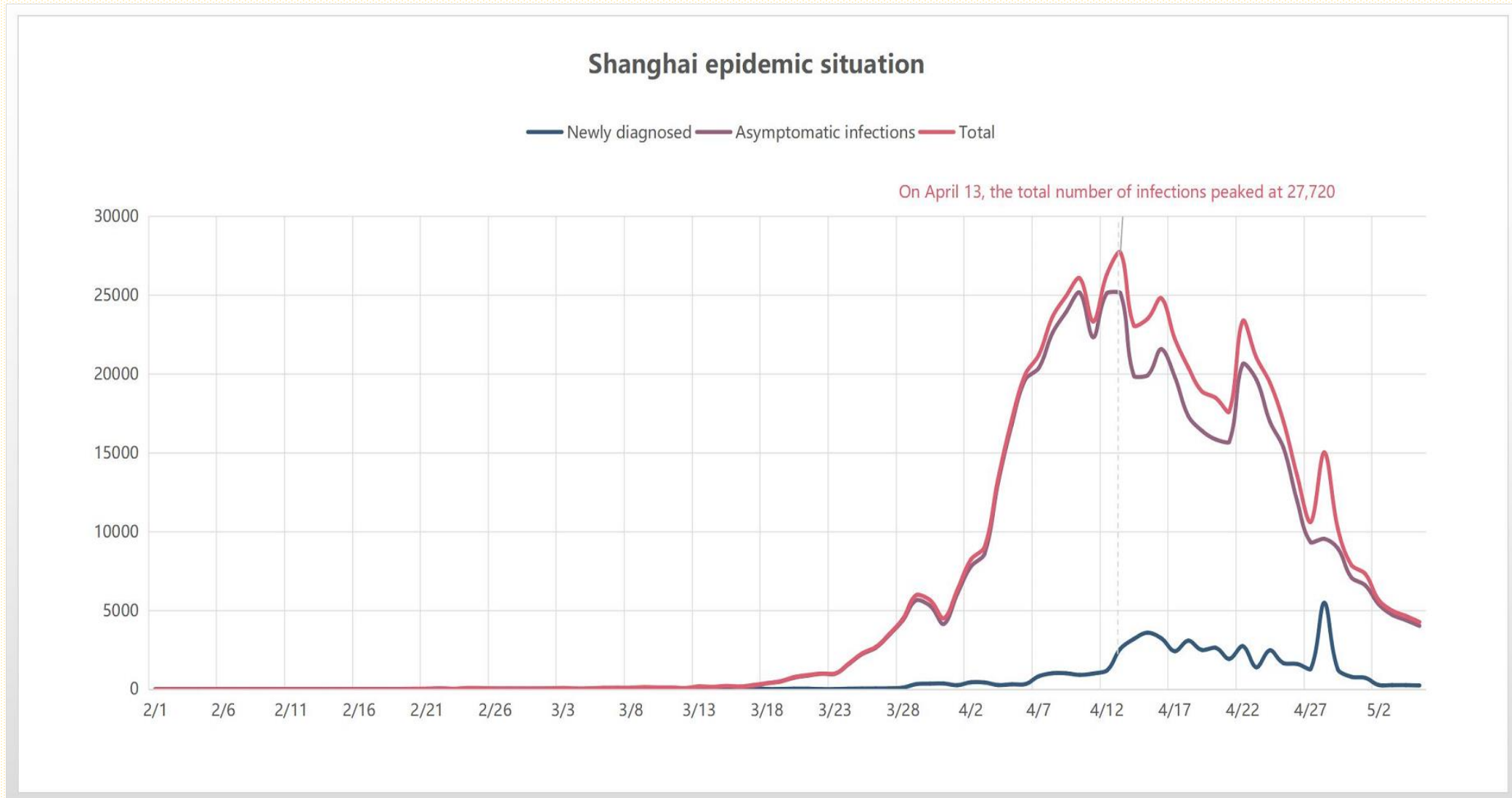




2. Dynamic Sales under “dynamic Zero -Covid policy”



1. Recent update of China Travel Retail



2. Retail Sales trend under “dynamic Zero Covid policy”

国家卫生健康委员会3月15日表示，要坚持“外防输入、内防反弹”总策略和“动态清零”总方针不动摇，采取果断措施，迅速流调溯源，快速核酸筛查。

China will adhere to its dynamic zero-COVID policy and strategies to tackle both imported and domestic infections, the National Health Commission said on March 15. The implementation of control measures for COVID-19 including epidemiological investigation and nucleic acid testing should be decisive, rapid and strict.



- **Dynamic sales** under
- **Dynamic traffic** under
- **Dynamic Zero Covid policy**



3. Hainan is on the way from Offshore duty free to Hainan retail



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3. Hainan is on the way from Offshore duty free to Hainan retail

- CDFG strives to build the world's largest single duty-free city - Haikou International Duty Free City (926k SQM)
- Expected to open Before Oct, 2022.





3. Hainan is on the way from Offshore duty free to Hainan retail

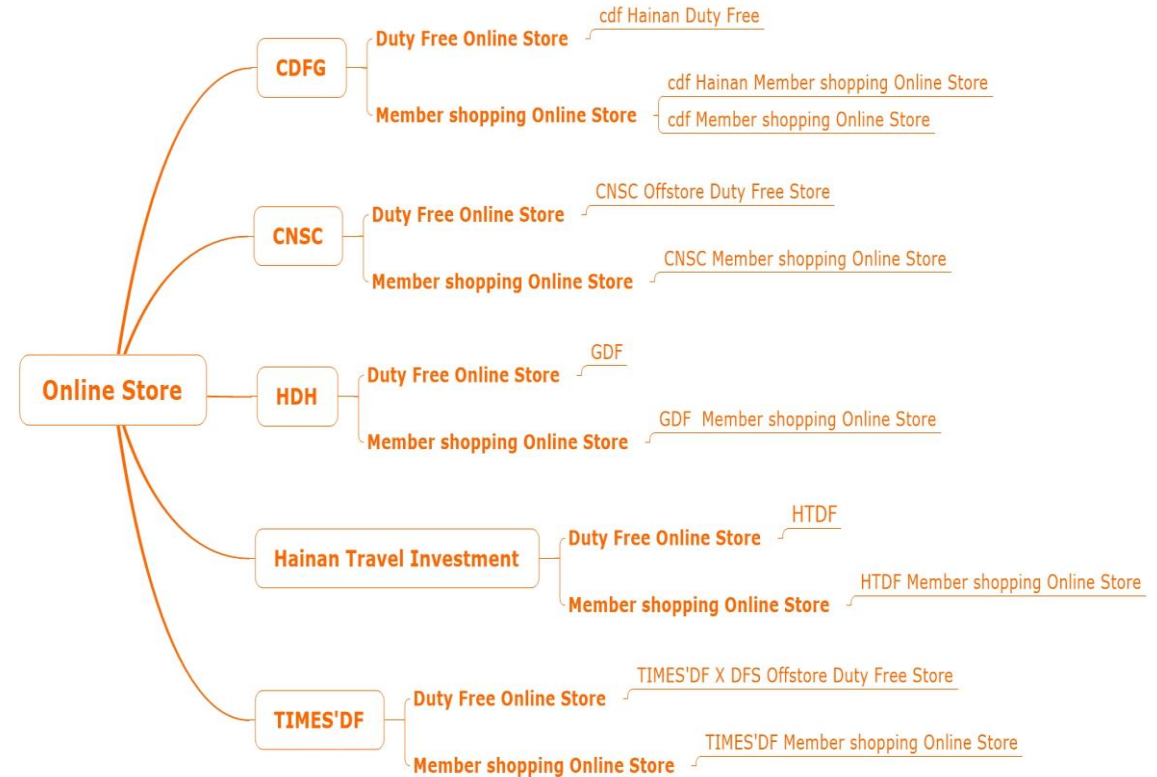
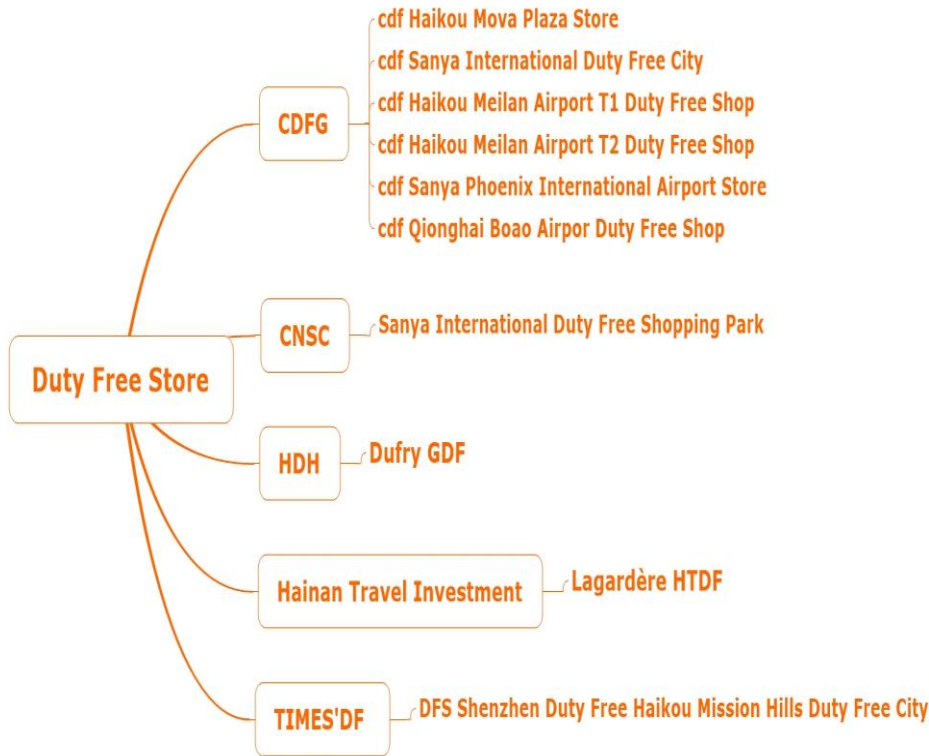
(1) What we said Offshore Duty Free 2.0 in Webnior TFWA, 2022

- ◆ More supplying partners
- ◆ More brands coming to present at Hainan offshore duty free market.
- ◆ More space (CDF Haikou Int'l Duty Free Plaza etc)
- ◆ Image upgrading
- ◆ Multi-role of retailers
- ◆ Multi-sales channels (duty free retail and member retail, online & offline)
- ◆ Multi-marketing channels (online & offline)
- ◆ Digitalize
- ◆ Islanders' duty free, pending, but on the way.



3. Hainan is on the way from Offshore duty free to Hainan retail

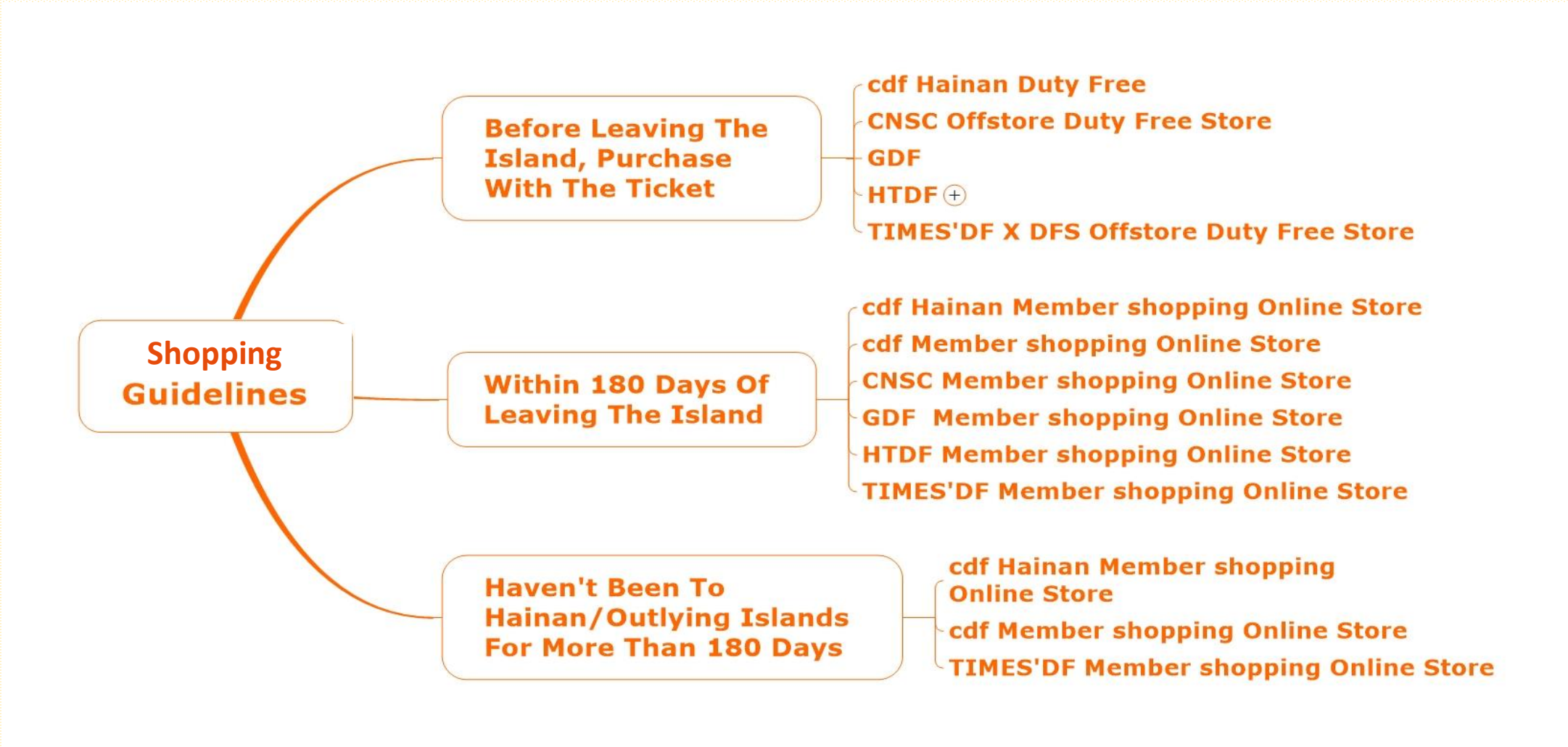
(2) Sales model under Offshore duty free retailers.





3. Hainan is on the way from Offshore duty free to Hainan retail

(2) Sales model under Offshore duty free retailers.





**4. New downtown duty free policy
will release soon with huge potential**

4. New downtown duty free policy and the trend



4. New downtown duty free policy and the trend



免税店 DF Downtown	地址 Address
中服免税北京市内店	北京市西城区廊房头条19号北京坊三阳号
中服免税上海市内店	上海市静安区万航渡路889号1-2层
中服免税杭州市内店	浙江省杭州市滨江区滨盛路1766号星光大道1-2层
中服免税南京市内店	江苏省南京市建邺区江东中路329号金奥美学生活馆1-2层
中服免税重庆市内店	重庆市南岸区南滨路133号长嘉汇购物公园1-2层
中服免税青岛市内店	山东省青岛市市南区香港中路2号海航万邦中心一层
中服免税大连市内店	大连市西岗区五四路66号恒隆广场东区1-2层
中服免税郑州市内店	郑州市郑东新区东风南路榆林北路绿地天空之城1-2层
中服免税哈尔滨市内店	黑龙江省哈尔滨市南岗区中兴大道168号哈西万达广场1层
中服免税南昌市内店	南昌市西湖区广场南路205号恒茂国际华城
中服免税合肥市内店	合肥市蜀山区潜山路与休宁路绿地花都国际广场
中服免税昆明市内店	昆明市五华区护国街道南屏街社区银佳大厦一楼



4. New downtown duty free policy and the trend

中华人民共和国中央人民政府
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国务院 总理 新闻 政策 互动 服务 数据 国情 国家政务服务平台

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发文机关: 国务院办公厅 成文日期: 2022年04月20日
标题: 国务院办公厅关于进一步释放消费潜力促进消费持续恢复的意见
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主题词:

国务院办公厅关于进一步释放消费潜力促进消费持续恢复的意见

国办发〔2022〕9号

各省、自治区、直辖市人民政府，国务院各部委、各直属机构：

消费是最终需求，是畅通国内大循环的关键环节和重要引擎，对经济具有持久拉动力，事关保障和改善民生。当前，受新冠肺炎疫情等因素影响，消费特别是接触型消费恢复较慢，中小微企业、个体工商户和服务业领域面临较多困难。为深入贯彻习近平新时代中国特色社会主义思想，完整、准确、全面贯彻新发展理念，加快构建新发展格局，协同发力、远近兼顾，综合施策释放消费潜力，促进消费持续恢复，经国务院同意，现提出以下意见。

一、应对疫情影响，促进消费有序恢复发展

（一）围绕市场主体加大助企纾困力度。深入落实扶持制造业、小微企业和个体工商户的减税退税降费政策。推动金融系统通过降低利率、减少收费等多种措施，向实体经济让利。引导金融机构优化信贷管理，对受疫情影响严重的行业企业给予融资支持，避免出现行业性限贷、抽贷、断贷。延续执行阶段性降低失业保险、工伤保险费率政策。对不裁员少裁员的企业，实施好失业保险稳岗返还政策。清理转供电环节不合理加价。采取切实有效措施制止乱收费、乱摊派、乱罚款行为。鼓励有条件的地区对零售、餐饮等行业企业免费开展员工定期核酸检测，对企业防疫、消杀支出给予补贴支持。落实好餐饮、零售、旅游、民航、公路水路铁路运输等特困行业纾困扶持措施。鼓励地方加大帮扶力度，支持各地区结合实际依法出台税费减免等措施，对特困行业实行用电阶段性优惠、暂缓缴纳养老保险费等政策，对承租非国有房屋的服务业小微企业和个体工商户给予适当帮扶，稳住更多消费服务市场主体。

（二）做好基本消费品保供稳价。结合疫情防控形势和需要，加快建立健全生活物资保障体系，畅通重要生活物资物流通道。在各大中城市科学规划建设一批集仓储、分拣、加工、包装等功能于一体的城郊大仓基地，确保应急状况下及时就近调运生活物资，切实保障消费品流通不断不乱。建立完善重要商品收储和吞吐调节机制，持续做好日常监测和动态调控，落实好粮油肉蛋奶果蔬和大宗商品等保供稳价措施。

相关报道

- 国务院办公厅印发《关于进一步释放消费潜力促进消费持续恢复的意见》

解读

- 国家发展改革委负责同志就《关于进一步释放消费潜力促进消费持续恢复的意见》答记者问

4月25日，国务院办公厅发布《国务院办公厅关于进一步释放消费潜力促进消费持续恢复的意见》。《意见》提出，**完善市内免税店政策，规划建设一批中国特色市内免税店。**

On April 25, the General Office of the State Council issued the "Opinions of the General Office of the State Council on Further Unleashing Consumption Potential and Promoting Continued Recovery of Consumption". The "Opinions" propose to improve the city's duty-free shop policy, and plan to build a number of city duty-free shops with Chinese characteristics.

- **完善市内免税店政策 (Improve downtown policy)**
- **规划建设一批中国特色市内免税店**
- **(build a number of city duty-free shops with Chinese characteristics.)**





5. Luxury brands continue to invest in China's travel retail



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店铺 Name of LV TR Duty Paid Shop	注册时间 Registered Date
路易威登北京首都机场店 Beijing Capital Airport	2021-05-24
路易威登北京大兴国际机场店 Beijing Daxing Intl Airport	2019-06-13
路易威登上海虹桥机场店 Shanghai Hongqiao Airport	2020-11-06
路易威登成都天府国际机场店 Chengdu Tianfu Intl Airport	2021-03-04
路易威登广州白云国际机场店 Guangzhou Baiyun Intl Airport	2021-12-15
路易威登深圳宝安国际机场店 Shenzhen BaoAn Intl Airport	2021-03-17



5. Luxury brands continue to invest in China's travel retail

Introduce 200 international brands within 3 years, develop port duty-free shops, and explore the establishment of duty-free shops in the city
Departure tax refund processing points will be set up in Guangzhou North Railway Station Business District (T4 Terminal Building)
Explore the construction of air-rail combined transport bonded exhibition experience and shopping duty-free complex at Guangzhou North Railway Station
On April 27, 2021, CTS Investment won the two parcels of Guangzhou North Railway Station with 8.395 billion yuan to build the first duty-free commercial, cultural and tourism complex in the Guangdong-Hong Kong-Macao Greater Bay Area.

3年内引入200个国际品牌，发展口岸免税店，探索设立市内免税店

广州北站商务区（T4航站楼）设置离境退税办理点

探索在广州北站建设空铁联运保税展示体验和购物免税综合体

2021年4月27日，中旅投资以83.95亿元拿下广州北站两地块，建设粤港澳大湾区首个免税商业文旅综合体

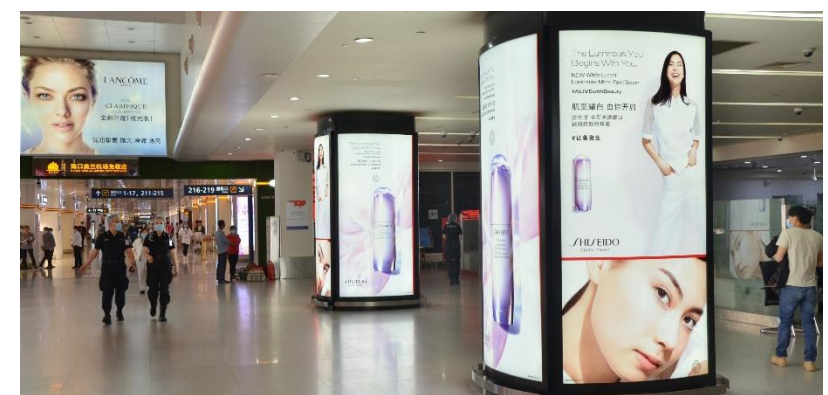


Guangzhou Board & Downtown Potential Duty Free Related Project



5. Luxury brands continue to invest in China's travel retail

Airport Brand Advertisement March 2022 (Asiaray)



5. Luxury brands continue to invest in China's travel retail



Shanghai Hongqiao Airport Domestic Area Luxury Boutique



5. Luxury brands continue to invest in China's travel retail





5. Luxury brands continue to invest in China's travel retail



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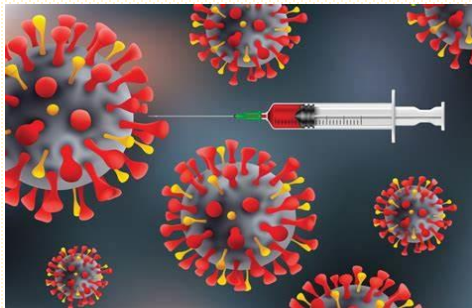
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Review

1. **China Travel Retail will keep growing in 2022 in dynamic way.**
2. **Dynamic sales under dynamic Zero -Covid policy**
3. **Hainan is on the way from Offshore duty free to Hainan retail**
4. **New downtown duty free policy will release soon with huge potential**
5. **Luxury brands continue to invest in China's travel retail industry**

In General, China Travel Retail will continue to growth under,

Optimizing POLICIES



+

Duty Free



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Q / A

- Jason Cao, Founder of DFE
- General Manager, Amberich International